

# Potentials Realized Case Studies

## Examples of Our Past Work with Clients

Established in 2004, Potentials Realized has become a global leader in coaching skills training, with a primary focus on group and teams. We also offer support in the areas of virtual facilitation, building a coaching culture, and developing leadership development programming for virtual team leaders.

Our work has been awarded the Prism Award for Excellence in Coaching (ICF-Toronto, 2016) and the Award of Excellence – Curriculum Design (Institute for Performance and Learning, 2017).



### Case Study

## Coaching and Mentoring Skills Train the Trainer Program

The UNICEF West and Central Africa Regional Office wanted to boost internal capacity by developing and enhancing their internal coaching and mentoring skills. The HR team brought together **25 staff members**, representing **21 offices across West and Central Africa**, for a **5-day Coaching and Mentoring Skills Train the Trainer Program**. Potentials Realized was engaged to custom design and deliver the 5-day training in Senegal, West Africa.

The training and materials were provided in French and English, focusing on skill acquisition and practice of foundational and advanced coaching and mentoring skills. Activities also focused on the adaptation of the skills and tools for their own program contexts. New coaches returned back with the task to share these skills with their colleagues at the Country Office level, in addition to designing their own internal coaching and mentoring programs (as appropriate).

During the five months that followed Country Office Teams were supported with twice a month group coaching calls and two virtual training sessions. The group coaching calls were designed to check in on progress, share experiences amongst the participants and identify common bottlenecks as well as successes. Throughout this five-month period, the new coaches designed and rolled out initial educational sessions with their Country Office Teams on Coaching, and identified local coaches to be trained.

### Impact

- » 25 staff trained in coaching and mentoring skills, becoming Internal Coach Resource Persons
- » 21 Country Offices impacted
- » Dozens of staff members coached and mentored as a result of the training

## Case Study National Training Team Coaching Skills Training

A national training team in the insurance industry engaged Potentials Realized to design and deliver a one-day coaching skills training program for the Canadian national training team. This training team delivers primarily virtual training to new employees/agents in the insurance industry.

The one-day customized program focused on the learning, practice and refinement of coaching skills for the National Trainers, and to identify when coaching would be appropriate in their work. If so, to be able to use more of a coach-like approach in their work. In total 27 learning professionals were trained, based from Vancouver to Halifax. Calls held with new coaches one month after the session indicated that they were able to incorporate many of the coaching approaches into their work, impacting the learning cycle of new agents.

### Impact

- » 27 Learning Professionals trained from coast to coast
- » Integration of enhanced coaching and virtual facilitation skills into the national training program for new agents and insurance personnel.

## Case Study Global Facilitation Team

Virtual Facilitation Skills are increasingly required by trainers, and facilitators, globally. Whether working with a group or team across one country or multiple continents, we work with facilitation teams to boost their facilitation skills for both in-person and virtual settings.

One global foundation engaged us to undertake a two-day in-person facilitation skills training program for their 15 staff. This included hands-on practice, and theory, around creating engaging facilitated conversations. From presentations, to focus groups, and convenings.

A follow-up engagement included on-site “embedded” coaching around facilitation and presentation skills for a wider team of the organization, during a three-day global stakeholder meeting.

### Impact

- » 15 managers, leaders and learning team members trained in enhanced facilitation skills
- » Enhanced confidence and skillset to lead more engaging and impactful in-person facilitations – from youth focus groups, to formal moderated sessions, to meetings.
- » Smoother, and more engaging, stakeholder sessions. Greater confidence on the part of staff leading the sessions.

## Case Study Coaching Skills Training - Virtually!

We are increasingly working with a wide range of organizations to delivery coaching skills training virtually, via zoom or Web Ex.

From 10-week sessions delivering a customized curriculum to virtual delivery of our ICF-CCE approved group and team coaching training, we have worked with close to a **100 internal leaders and coaches** (internal and external) in the first five months of 2018 alone.

The benefits of coaching skills training include immediate application, interactive practice sessions during the call, lower cost per capita, expanding training over a longer term for greater uptake.

### Here's what past participants have said about our work:



*"Jennifer - you were fantastic! I really enjoyed the session and time flew by. Great structure and facilitating! You were very motivating. Looking forward to your next session with us."*



*"The session was fun and informative. Your style is very conducive to open, honest conversation."*



*"Terrific day! Typically, I find these sessions drag on, but this was not the case with this one. I felt engaged for the whole day. It flew by. I think that this has to do with relevance of topics, great facilitation and great planning."*

## Team Coaching and Team Effectiveness Case Studies

Potentials Realized also coaches teams in organizations, supporting them enhance skills, develop enhanced communication and teamwork skills, boosting their productivity and business relationships/positivity.

Typically, team coaching engagements run for a 3-6-month period, and include the Stellar Team Diagnostic Assessment, a strengths-based team assessment mapping the team system's strengths in 14 key areas related to productivity and positivity.

Shorter Team Effectiveness sessions can incorporate the Everything DiSC or StrengthsFinder processes.

## Health Care

### Team Coaching Engagements

Starting with the Team Diagnostic, and running for a period of 6 months, team coaching engagements within the health care sector have focused on role clarification, communication, and goal setting.

Team coaching engagements have involved hospital-based teams, as well as health care teams working at the community level.

### Team Retreats

Newly forming teams have benefitted from half day and one day retreats (on and off-site). Key focus areas have been - team dynamics, getting to know each other, and identifying strengths that reside in the team. Team follow up calls lock in accountability around key goal areas, and action plans, identified during the retreat process.

## Financial Services

### Six Month Team Coaching Engagement

Team coaching in the financial services industry have focused on key topics including: action planning with key accountabilities, strengths mapping, and holding difficult conversations.

### Annual Organizational Retreats

Strengths Mapping and exploration of how the organization utilizes their strengths within, and across, departments. Action planning to include strengths.

### Outcomes

Enhanced understanding of the styles and preferences of different team members regarding communication, feedback and work styles. Appreciation of where overall strengths lay and where gaps exist.

## Social Services, Consumer Packaged Goods, Legal Services

### Everything DiSC and Team Development Sessions

From five-hour to one or two-day sessions we have delivered a wide range of team development sessions, incorporating the DiSC and elements of team effectiveness training.

A primary focus for teams is becoming more effective in working together, understanding different styles on the team, and finding more effective ways to work across differences.

## Other Sectors (Mining, Chemical, Safety)

Executive Team Planning Retreats with focus on strategic planning, as well as team development issues

One to two-day team building retreat processes focusing on styles, and factors of a high performing team

Facilitation of focus group meetings and learning strategy development work

## Government Entities - Federal, Provincial and Municipal

We have delivered both short-term speaking services to government entities in Canada for several years including:

- » Keynotes on Coaching and Mentoring Skills
- » Sessions for Departments and Divisions including the Ontario Provincial Police, and other Ministries, focusing on Personal Productivity/Time Management, and Emotional Intelligence.
- » Work with Municipal teams:
  - Longer term engagements utilizing a combination of individual and team coaching. Focus on leadership capacity development, and team development.
  - One off retreat programs focusing on styles, factors for a high-performing teams, communication, emotional intelligence, and strategic planning.

## On Demand Programming

Since 2014 we have offered a series of on-demand programs for leaders and facilitators in addition to our live, public virtual sessions. You may be interested in exploring licensing options for our e-learning programs and video-based training in these areas:

- » Coaching and Mentoring Skills Training
- » Team Effectiveness
- » Foundations of Feedback and Performance Conversations
- » Foundations of Goal Setting.

Looking for more information or to explore how we can partner with you to create an exceptional learning experience for your teams or organization?

Please contact Jennifer Britton directly at  
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For daily tips for team leaders, please visit the Teams365  
blog at [www.potentialsrealized.com/teams-365-blog](http://www.potentialsrealized.com/teams-365-blog).

Potentials Realized is an authorized partner or facilitator of the following:



Potentials Realized founder, Jennifer Britton, is the author of:



Effective Group Coaching (Wiley, 2010)



From One to Many: Best Practices for Team and Group Coaching (Jossey-Bass, 2013)



Effective Virtual Conversations (2017)

Coaching Business Builder – Workbook and Planner (2018)